

FIELD REP POCKET GUIDE

BASIC SKILLS YOU'LL FIND HERE

- Create New Company/Contact
- Prep for a sales call
- Find nearby opportunity
- Capture notes/set reminders
- Create Opportunities
- Use Sync+ to add contacts
- Create Opportunity in Sync+



CREATE NEW COMPANY OR CONTACT

Contacts

E-Mail

Calenda

More



4) Add details. 5) Hit save.







USE NEARBY TO FIND BEST DROP-IN & FILTER COMPANIES

 From the home screen, click on nearby to use the map.
 Enter name of city where you'll be making sales calls.



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 3) Hit magnifier glass for search to take affect.
 4) After you click on a red pin, click Directions for Google Maps to launch.
 5) Click on name of company for account details (like prepping for a sales call).



6) Use Funnel icon to filter

7) Select a filter and option

company records.

8) Apply the filter by clicking "filter" at bottom.9) Close Filter Options menu by clicking X.





ADD CONTACTS & OPPORTUNITIES IN SYNC+

1) Open Sync+ with home tab selected and 2) body of email visible. (Reading panes off won't work.) 3) Green + icon is a prompt to add that contact. Click it, fill in details, save. 4) Purple business card icons, mean that is a contact already saved in your contacts.

5) Gold crowns are
opportunities. This (?) shows there is no opp yet.
6) Click plus, 7) click "New
Opportunity"
8) Fill in details of opp.
9) Hit save
TIP: the pencil lets you edit. The square with an arrow is a shortcut to Repfabric.



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HOW TO PREP FOR A SALES CALL (1 OF 2)

1) From the home screen, click on the more button at the bottom. T-Mobile Wi-Fi 😴 6:19 AM 10 ofabric Follow Messages Nearby Uns 1-2019 08:00 am date Opps 01-31-2019 12:00 pm Lillyhammer Industries 01-31-2019 02:00 pm LRA Supply 02-01-2019 08:00 am Update Opps 02-01-2019 10:00 am Xcel Outsourcing, Inc. 02-01-2019 12:00 pm Ferguson Rolling Meadows 02-01-2019 02:00 pm Bard Townsend No Tasks 8 \boxtimes Ē 000 Contacts E-Mail Calendar More

2) Then click on companies button.

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3) Enter the account you're prepping for.



4) Click anywhere on or near the name to open the record.







HOW TO PREP FOR A SALES CALL (2 OF 2)

5) Click the people icon to see who your contacts are at this company or location.

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6) Click the opportunities icon to see all open deals.

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Tesla Motors Approved the q 01-09-2019	MAJR Pro	oducts	c
Tesla Motors We discussed o 09-19-2018	Ampheno Lead	I RF	c

7) Click the journal to see notes on past calls. Notice the dates and if anything needs follow up.
8) Click \$ for dashboard.



9) Roll the year to the period you want.10) For part # specifics, click on manufacturer line.







CAPTURE NOTES & SET FOLLOW-UP REMINDERS (1 OF 2)

1) Start at contacts from the home screen.

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01-01-2019 08:00 am Update Opps	
01-31-2019 12:00 pm Multiplammer Industries	
01-31-2019 02:00 pm IRA Supply	
02-01-2019 08:00 am Indate Opps	
02-01-2019 10:00 am	
02-01-2019 12:00 pm	
02-01-2019 02:00 pm Bard Townsend	
No Tasks	
Contacts E-Mail Calendar	ooo More

2) Enter a name of who you will visit. 3) Click "add activity journal" icon.

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4) Skip the first screen everything is done. 5) **Click details.**



6) Click on the grey box, enter notes with keyboard OR7) click black triangle to use the pitches.

8) Select phrase, click add comment.







CAPTURE NOTES & SET FOLLOW-UP REMINDERS (2 OF 2)

9) Click calendar to add a follow-up date. 10) Pick date. 11) Hit the disk icon to save your activity journal.



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12) Journal savednotice appears.13a)You can create anopportunity or 13b)update other currentopportunities.

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T-Mobile Wi-Fi 🗢 6:23 AM

Quote PN453-22, gty 5,000

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02-15-2019 📷

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14) Opp created notice appears 15) When the + is not there, that is now a shortcut to edit the opportunity.

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T-Mobile Wi-Fi 🗢 6:23 AM

Activity Details

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Quote PN453-22. tv

our products

Opportunity created

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16) Click the pencil so you can edit fields. 17) Update specifics 18) Save.









Click the Repfabric logo from any screen to return to the home screen in the app.

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> Register for classes here: https://tinyurl.com/Repfabric-Training

